



U.S. General Services Administration

Federal Acquisition Service

Bill of Materials / Statement of Work (BOMSOW)

GSA Training Module for IWAC Region

BOMSOW Training Module Overview

Description: This training module will take you step-by-step through the Bill of Materials/Statement of Work (BOMSOW) document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component, specifically for the IWAC region.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

BOMSOW Glossary

Term	Definition
BOMSOW	Bill of Materials/Statement of Work
Delivery Date	The Order level Delivery Date is the maximum delivery date of all active COM task items.
Negotiated Award Date	The final date agreed upon for the order to be awarded.
NAICS Code	North American Industry Classification System; 4-6 digit code.
POP From	Date the Period of Performance begins
POP To	Date the Period of Performance ends
Order Summary	Used to list the order requirements or provide basic instructions for the vendors.
Requirements	File attachments containing requirements for the order.
LAB	Labor (Task Item Type)
COM	Commodities (Task Item Type)
FFP	Firm-Fixed Price (Task Item Type)
Approving Official	Optional designation on BOMSOW to require a GSA official (besides the CSR) to approve the winning quote prior to client approval and/or certification of funds.
Publish in e-Buy	Option on the BOMSOW to publish the RFQ to e-Buy using e-Buy Connect.

BOMSOW Privileges

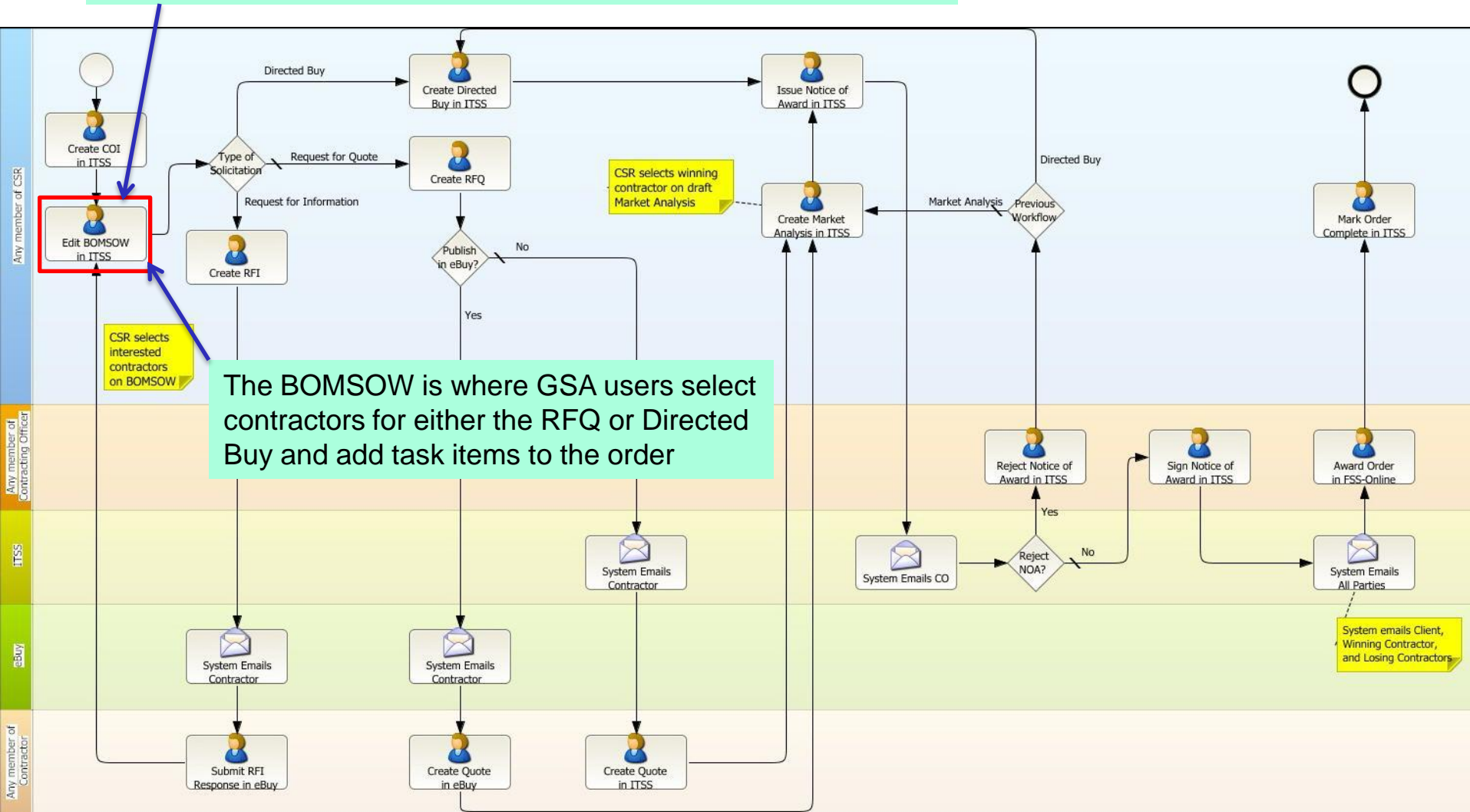
User Role Action	Create	Edit	View
GSA Users	✓	✓*	✓
Client			✓
Contractor			✓**

*Limited edit privileges if RFQ is in open state in e-Buy

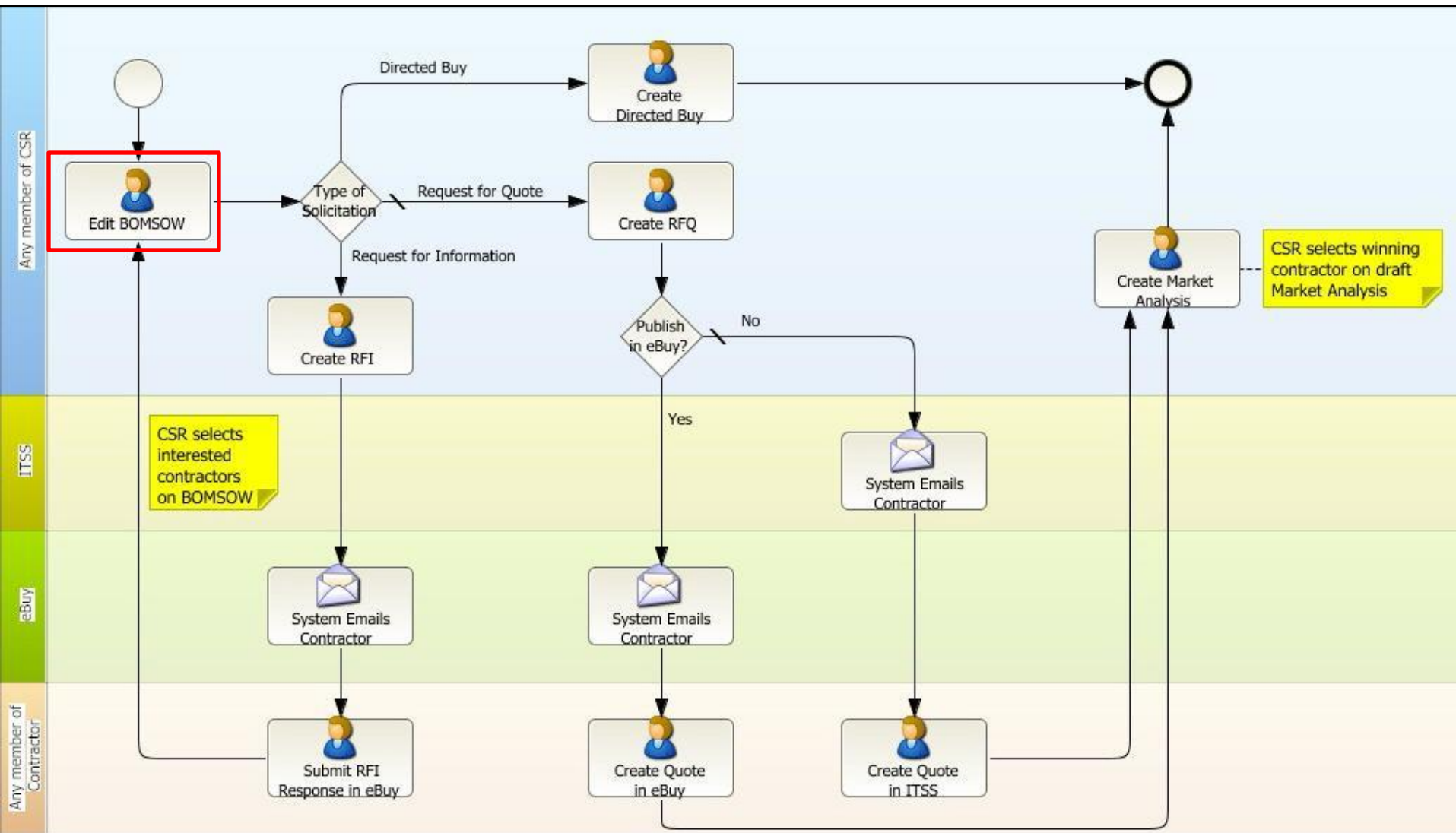
**Contractors may only view pre-award if on Contractor List

Within the Pre-Award Workflow Context

The BOMSOW is automatically created when the COI is submitted



Within the Solicitation Workflow





You are signed in as CSR1 IWAC

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[WELCOME](#)

[ORDERS](#)

[FUNDING](#)

[REGISTRATION](#)

[CONTRACTS](#)

Select a View:

<<-- View Orders -->>



<<-- View Inactive Orders -->>



<<-- View Action Items -->>



<<-- View Support Information -->>



Go to a Specific View Item:



[Create New Order](#)

Orders - Entire Package

Next -> |

▼ Order Package

▼ REQUISITION005-COI Jamie Client (Test Organization) Award Notice Issued>>ROB

00 Chronology

▼ 01 BOM/SOW REQUISITION005 - 00 Amendment 00 AWARD NOTICE ISSUED

▼ RFQ Modification 00 Amendment 00 Revision 00 GSA APPROVED

Quote Amd 00 Rev 00 for Jim Contractor (TEST COMPANY CORP INC) Cnt# 263-97-D-0313, BID=\$883,500.00

Quote Amd 00 Rev 00 for William Vendor (ACME CORPORATION) Cnt# GS-02F-0154R, BID=\$925,000.00

Quote Amd 00 Rev 00 for Patricia Partner (COMPANY ASSOCIATED) Cnt# GS-35F-0390K, BID=\$900,000.00

*Market Analysis Amendment 00 - Quote Selected: Jim Contractor - TEST COMPANY CORP INC (263-97-D-0313), \$927,675.00

>Notice of Award - Signed



Click on the 'BOM/SOW' link in the Order Package view to open an existing BOMSOW in view mode. Only one BOMSOW document exists per order.




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▼ GSA Order Support

 All Fields marked with  should be filled in by a GSA Representative.

1. Cust Svc Rep: 

2. Cust Svc Rep:

3. Cust Svc Rep:

Contracting Officer:

Alt Contract Officer:

▶ Edit History

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After populating required fields on the COI, the GSA user can click on the *Submit and Proceed to BOMSOW* button to create a new BOMSOW which loads in edit mode

Bill of Materials / Statement of Work
Save as
Draft

Submit for
GSA Review

Close Without
Saving

All Fields marked with are required.

Submitted By: CSR1 IWACAAS at 10/11/2010

Order ID: REQUISITION003, Mod 00, Amendment 00

Client Rep: Jamie Client (Test Organization)

Status: **Draft**

View information about the order

View the BOMSOW status

Format dates as mm/dd/yyyy

Client Project Acceptance Date

BOM/SOW Finalized Date

Customer Funding Received Date

Negotiated Award Date

Enter dates specific to the order

Review the Client Order**Project Descriptor:** ROB**NAICS Code:**

Enter the NAICS code

Severable Order?: ☐ Yes ☐ No**National
Emergency?:**☐ Yes ☒ No**This is a
Performance Work
Statement or
Statement of
Objectives:** ☐ Yes ☐ No

Is this order severable?

Is this order for a National Emergency?

Is this a PWS/SOO?

All of these fields are for reporting purposes.

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Add a COM
Task Item

Add a LAB
Task Item

Add a FFP
Task Item

Active ⁺	Type ⁺	Item No. ⁺	Description ⁺	POP From ⁺	POP To ⁺	Delivery Date ⁺	Remove
No task items have been added.							

Order Summary:

🟡 **AND/OR** - To complete the BOMSOW, you must enter in either an Order Summary (above) or attach one or more requirements document(s) (below). You may use both - one is required.

Requirements:

File Attachments:



Enter an Order Summary in the text area and/or upload a file attachment with the order's requirements

Task items are added to the BOMSOW. The BOMSOW must have at least one task item to submit. Planning of the task item structure on the order is essential since users cannot add or remove task items once an RFQ or Directed Buy is created.

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Active ⁺	Type ⁺	Item No. ⁺	Description ⁺	POP From ⁺	POP To ⁺	Delivery Date ⁺	Remove
No task items have been added.							

Order Summary:

Requirements: **File Attachments:**

📎

Click a button to add a task item of that type. A new task item row will be added to the task item table. Contractors will bid on all task items.

IWAC orders only have active task items

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Add a COM Task Item

Add a LAB Task Item

Add a FFP Task Item

Active ⁺	Type ⁺	Item No. ⁺	Description ⁺	POP From Date ⁺	POP To Date ⁺	Delivery Date ⁺	Remove
<input checked="" type="checkbox"/>	COM	0001	Workstations	n/a	n/a	12/01/2010	
<input checked="" type="checkbox"/>	COM	0002	Desks	n/a	n/a	12/01/2010	
<input checked="" type="checkbox"/>	COM	0003	Chairs	n/a	n/a	12/01/2010	
<input checked="" type="checkbox"/>	COM	0004	Demountable Walls	n/a	n/a	12/01/2010	
<input checked="" type="checkbox"/>	LAB	0005	Installation	12/01/2010	12/23/2010	n/a	

Order S

Each task item has a Type of either COM, LAB, FFP, or FEE.

Requi

Fee-only task items are not added on the BOMSOW. Fee-only task items are added on either the Market Analysis or Directed Buy.

Just enter in either an Order Summary or Item(s) (below). You may use both

Each task item must have a unique Item No. to identify the task item within the order. The Item No. is an alphanumeric field with a maximum length of 10 characters.

The Item No. will be displayed on all subsequent documents throughout the order including the email notification to the winning contractor.

Enter a description for each task item. The description does not have to be unique.

Depending on the status of the BOMSOW, users can remove an erroneously added task item by clicking the X

Task Items: Active task items are required to be funded. Inactive task items may be marked active during order modification. Orders must have at least one active task item.

Add a COM Task Item

Add a LAB Task Item

Add a FFP Task Item

Active ▾	Type ▾	Item No. ▲	Description ▾	POP From Date ▾	POP To Date ▾	Delivery Date ▾	Remove
<input checked="" type="checkbox"/>	COM	0001	Workstations	n/a	n/a	12/01/2010	
<input checked="" type="checkbox"/>	COM	0002	Desks	n/a	n/a	12/01/2010	
<input checked="" type="checkbox"/>	COM	0003	Chairs	n/a	n/a	12/01/2010	
<input checked="" type="checkbox"/>	COM	0004	Demountable Walls	n/a	n/a	12/01/2010	
<input checked="" type="checkbox"/>	LAB	0005	Installation	12/01/2010	12/23/2010	n/a	

Order Summary:

Order Summary

AND/OR - To complete the BOMSOW, you must enter in either an Order Summary (above) or attach one or more requirements document(s) (below). You may use both - one is required.

Requirements:

File Attachments:



COM task items must have a Delivery Date

LAB and FFP task items must have a POP From date (aka POP Start) and a POP To date (aka POP End).

POP To dates must be after or on POP From dates.

Attach the SOW as a file attachment to the BOMSOW document with of all the order details

Click here to download a Standard Materials Template

To use Standard Materials Template, [Click Here](#).

If you are requesting a specific supplier, vendor, or brand name product for your order, [Click Here](#).

☐ Use Supplied Template for Quotes

**Multiple Shipping
Addresses:**

If your order has multiple ship-to addresses, enter them in the box below. These addresses will be copied or referred to on the Purchase Order (GSA Form 300 in Block 20) once the order is awarded.

Enter multiple shipping addresses here

**Special
Instructions:**

Enter any other special notes you would like to make about the order requirements here.

**Publish in
e-Buy:**

Would you like to publish this opportunity as an RFQ in e-Buy?

☐ Yes ☐ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Approval Info:

Must the winning quote be approved before this order goes to client approval and funds are certified?

☐ Yes ☒ No

If Yes, select Approving Official's name from the list:

-- Select Approving Official --

[Edit History](#)

Save as
Draft

Submit for
GSA Review

Close Without
Saving

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GSA user can select to have a GSA Approving Official approve the winning Quote prior to client approval (if selected) and the issuance of the Notice of Award.

GSA user can publish the RFQ in e-Buy or ITSS. Select the appropriate radio button and the BOMSOW will refresh with additional details.

To use Standard Materials Template, [Click Here](#).

If you are requesting a specific supplier, vendor, or brand name product for your order, [Click Here](#).

☐ Use Supplied Template for Quotes

**Multiple Shipping
Addresses:**

If your order has multiple ship-to addresses, enter them in the box below. These addresses will be copied or referred to on the Purchase Order (GSA Form 300 in Block 20) once the order is awarded.

**Special
Instructions:**

Enter any other special notes you would like to make about the order requirements here.

**Publish in
e-Buy:**

Would you like to publish this opportunity as an RFQ in e-Buy?

☒ Yes ☐ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Sources Sought:

Post as a Sources Sought or Request for Information (RFI) notice?

☐ Yes ☐ No

Contractor List:

Contractor selection is not required in ITSS at this time>

Approval Info:

Must the winning quote be approved before this order goes to client approval and funds are certified?

☐ Yes ☒ No

If Yes, select Approving Official's name from the list:

-- Select Approving Official --

If GSA user selects Yes to Publish in e-Buy then the Sources Sought field is displayed and contractor selection will be performed in e-Buy upon submission of the RFQ GSA user will no longer have the option of creating a Directed Buy.

See the RFQ training module for details on e-Buy contractor selection.

[Edit](#)

To issue an RFI, select Yes on the Sources Sought field

Save as
Draft

Submit for
GSA Review

Close Without
Saving

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To use Standard Materials Template, [Click Here](#).

If you are requesting a specific supplier, vendor, or brand name product for your order, [Click Here](#).

☐ Use Supplied Template for Quotes

Multiple Shipping Addresses:

If your order has multiple ship-to addresses, enter them in the box below. These addresses will be copied or referred to on the Purchase Order (GSA Form 300 in Block 20) once the order is awarded.

If GSA user selects *No* to Publish in e-Buy then the Contractor List will be displayed and contractors will be selected in ITSS. After the BOMSOW is submitted, GSA user will have the option of creating an RFQ or Directed Buy.

Special Instructions:

Enter any other special notes you would like to make about the order requirements here.

Publish in e-Buy:

Would you like to publish this opportunity as an RFQ in e-Buy?

☐ Yes ☒ No

If Yes, you will select contractors within e-Buy after you submit the RFQ in ITSS.

Contractor List:

<<----- List ----->>

As a GSA user selects contractors from the pick list they are added to the Contractor List field and *selected* in blue. GSA user should ensure their contractors are highlighted in blue before submitting the BOMSOW. Contractors in the Contractor List but not *selected* will not be issued the RFQ.

Pick From List

Clear the List

Approval Info:

Must the winning quote be approved before this order goes to client approval and funds are certified?

Click the *Pick From List* button to display the Contractor Selection list

It's name from the list:

[Exit history](#)

Save as Draft

Submit for GSA Review

Close Without Saving

This is a U.S. General Services Administration Federal government computer system that is "For Official Use Only".

If GSA user wishes to select contractors at a later time they can save the BOMSOW as a draft

Enter the first part of the value and click Go to jump directly to the first matching record

Close Window

Select Contractors From The List Below

Change the Sort Value: Contractors by Company

Go To a Specific Value: test Go

Next ->

- Contractors By Company
 - TEST COMPANY CORP INC
 - TEST COMPANY914MLP
 - TESTMASTERS INC

Click the drop-down arrow to search by another value

Contractors by Company

Contractor Distribution Lists

Contractors by Company

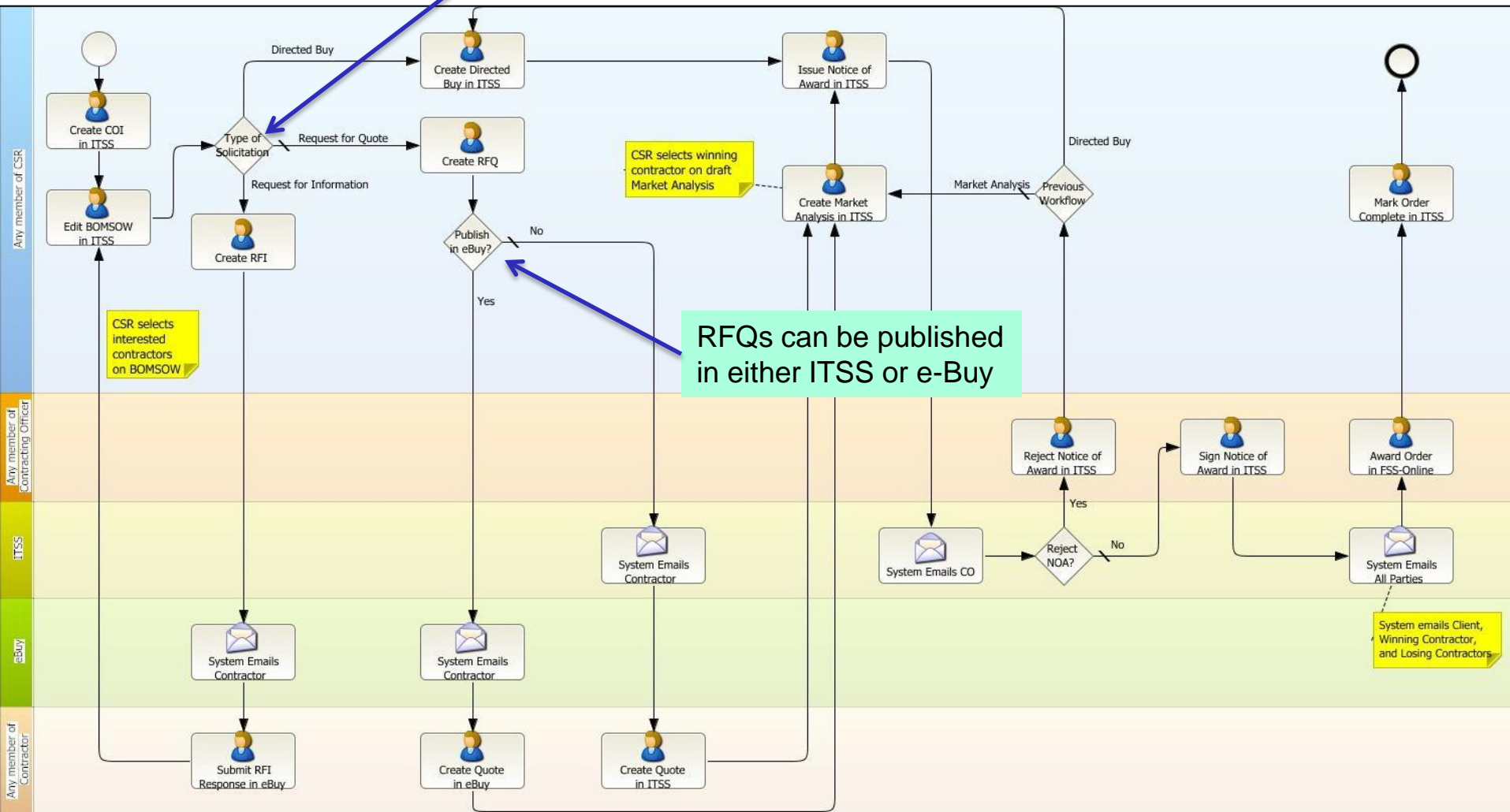
Contractors by Name

Contractors by Contract Number

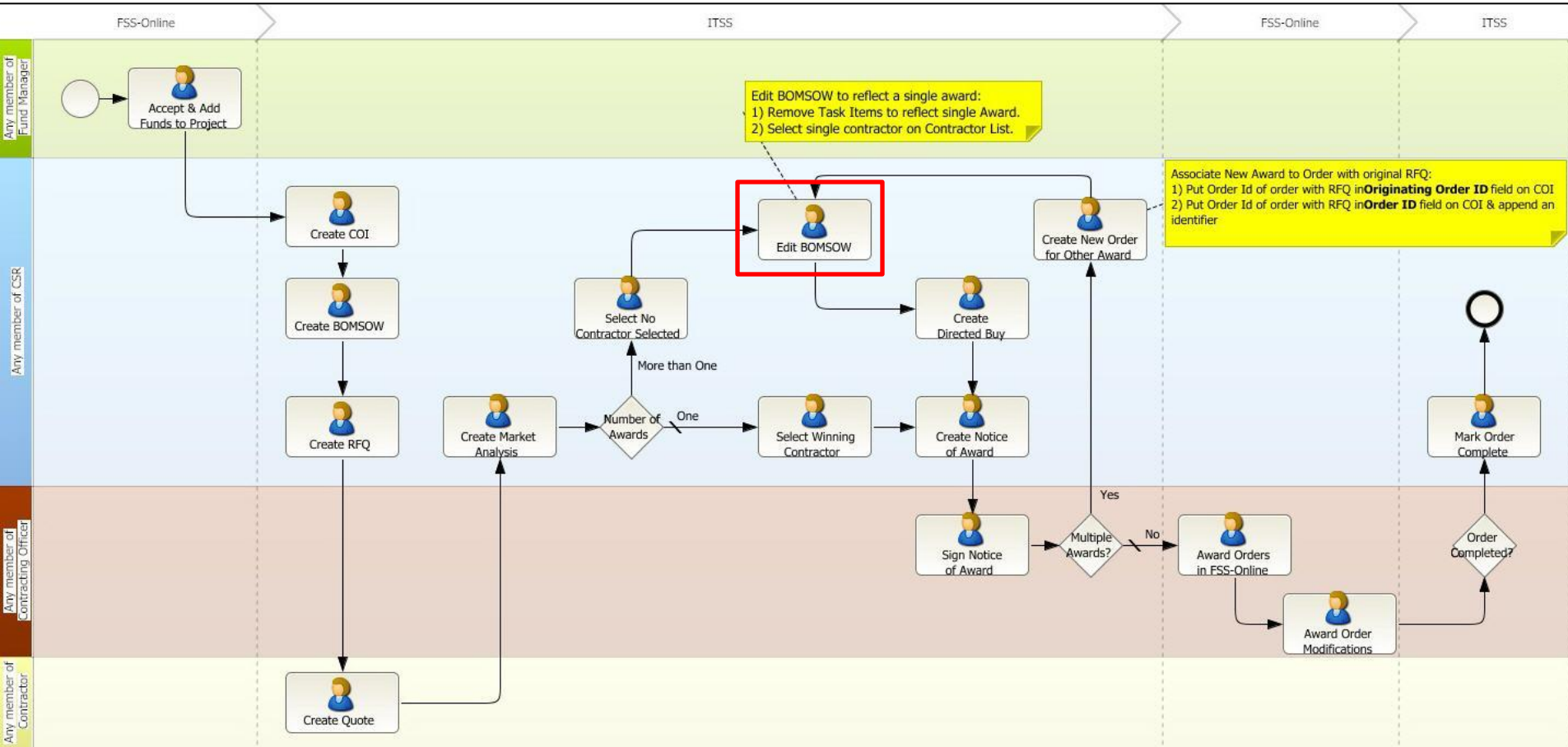
Click on a blue twistie to view all of the contractors registered under that company

Next Steps...

Once the BOMSOW is submitted for GSA Review, the GSA user can proceed with either issuing an RFQ or creating a Directed Buy



Splitting an Order into Multiple Awards



If the original order is going to be awarded to more than one contractor then the GSA user should do the following:

1. Select 'No Contractor Selected' on Market Analysis
2. Edit the task item list & Contractor list on the BOMSOW to reflect a single award
3. Create a Directed Buy and issue a Notice of Award to single contractor
4. Create new order(s) using Directed Buy and issue Notice of Award to other contractor(s)

BOMSOW Status Glossary

Status	Definition
Draft	BOMSOW has been saved but not yet submitted for GSA Review.
In-Process	BOMSOW submission complete. CSR may create a Directed Buy or RFQ, based on e-Buy fields selected on BOMSOW.
Quotes Requested	RFQ has been submitted and RFQ close date is later than current date.
Quotes Process Closed	RFQ close date is earlier than current date. CSR can now create another RFQ or create a Directed Buy.
Market Analysis	A new Market Analysis has been generated.
Directed Buy	A new Directed Buy has been generated.
Analysis Complete	If Approving Official acceptance is required, the Market Analysis has been accepted by an Approving Official.
Award Notice Issued	Notice of Award has been signed by the Contracting Officer. The order award and post-award activities will be conducted in FSS-Online.

Federal Acquisition Service

Questions & Support

- For questions regarding IWAC Policy please contact stephen.gervasi@gsa.gov
- For questions regarding the RBA BOMSOW training module please contact RBA Technical Support:
 - Phone: (877) 243-2889
 - Email: helpdesk@gsarba.com

